

Family Income and Expense Worksheet – 2018

This form is intended to correlate your family's annual income sources and expenses. Make sure to list all sources of income for the calendar year, including gifts from relatives, and government benefits. Please also provide documentation of any government assistance you may have received during the year.

Student Name: _____ **Columbia ID:** _____

Income: Please list all sources of income received in 2018.

| | |
|---|---|
| Wages (box 1 of your W-2 statements): _____ | Prior year tax refund: _____ |
| Dividend and Interest income: _____ | Government Benefits (SNAP, TANF, etc.): please specify type of assistance and amount received for each: _____ _____ |
| Net business income: _____ | |
| Unemployment compensation: _____ | |
| Social Security Income: _____ | Gifts from family or friends: _____ |
| Alimony received: _____ | _____ |
| Pension/IRA distributions: _____ | Other income: Please clarify source and amount: _____ |
| Child support received: _____ | |

Expenses: Please list all annual expenses paid in 2018.

TOTAL Income: _____

| Household Expenses | Household Expenses, cont'd | Taxes; Other |
|--|---------------------------------|---|
| Rent/mortgage: _____ | Food: _____ | Federal Taxes: _____ |
| Education Loan repayment: _____ | Transportation: _____ | State/Local Taxes: _____ |
| Car payments: _____ | Utilities: _____ | Real Estate Taxes: _____ |
| Credit Card payments: _____ | Telephone: _____ | Union Dues: _____ |
| Homeowner's/Renter's Insurance: _____ | Medical/Dental: _____ | Child Support/Alimony paid: _____ |
| Health Insurance: _____ | Clothing/Laundry: _____ | |
| Life Insurance: _____ | Home maintenance: _____ | Out-of-pocket expenses for relatives: please specify: _____ _____ |
| Car Insurance: _____ | Charitable contributions: _____ | |
| Sibling elementary/secondary school tuition expenses: _____ | Recreation/entertainment: _____ | |

TOTAL Expenses: _____

If your expenses exceed your income, please provide clarification on a separate page.

Student Signature _____

Date _____

Parent Signature _____

Date _____